



Version 2.076 Release Notes



25B Hanover Road * Florham Park, NJ 07932
Phone: 800-343-6844 * Fax: 973-360-0699
www.unicornhro.com

Table of Contents

New Manager Services Functions 1
 Employee Benefit Group Status..... 1
Updated Manager Services Functions 2
 Benefit Enrollment Defaults 2
 Benefit Enrollment – Core Benefits Assignment..... 3
 Deduction Data Import 3
 Employer Deductions – HSA and FSA Enrollments 4
 Health Savings Accounts Plans 4
 Paid Time Off Liability Report..... 5
 Pay Code Definition / Pay Process Control 5
 Quarterly FLI MLI Wages and Hours Export..... 6
 Terminate Employee-Terminate Benefit Tab and Terminate Benefit Enrollment 6
 Total Compensation Statement 8
 State Income Tax Withholding 8
Updated Employee Self Service Functions (Classic ESS) 10
 First Time Enrollment - Rehires 10
Updated iCON Tools Functions 11
 Paid Time Off Liability Report..... 11
 Pay Code Definition / Pay Process Control 11

New Manager Services Functions

This section describes new functions in Manager Services.

Employee Benefit Group Status

A new function called **Employee Benefit Group Status** will be added to Manager Services that will store a future effective dated Benefit Group record for the employee.

- For example, the user can enroll an employee in a future effective dated Benefit Group
 - Employee Cabana is currently in Benefit Group = F/T Employees
 - Employee Cabana will be in Benefit Group = SGM Benefits with effective date = 10/01/2023.
- Only one future effective dated record will be allowed for each employee.
 - Once the employee is moved to the future effective dated Benefit Group, the user can enter a new future effective dated record.

Summary | Address | Education | Employee Positions | Employee Overview | Employment Status | Payche

Anna Cabana
Payroll Accountant
CONS. Group / Raleigh Labs / Durham / Payroll

Employee Details
Number: 3205
Status: Active
Hire Date: 06/01/2023
Reports To:
Direct Reports: 0

Add Employee Benefit Group Status
* = Required.
*Effective Date: 10/01/2023
*Benefit Group: SGM Benefits

submit cancel

Summary | Address | Education | Employee Positions | Employee Overview | Employment Status | Payche

Anna Cabana
Payroll Accountant
CONS. Group / Raleigh Labs / Durham / Payroll

Employee Details
Number: 3205
Status: Active
Hire Date: 06/01/2023
Reports To:
Direct Reports: 0

Employee Benefit Group Status + add

Benefit Group Status cannot be changed. Information must be either added or deleted.

Effective Date	Benefit Group	Status	User ID	Date Entered	Time Entered	Action
10/01/2023	SGM Benefits	Active	mruberto	09/11/2023	15:54:36	delete

+ add

Updated Manager Services Functions

This section describes updated functions in Manager Services.

Benefit Enrollment Defaults

- The **Benefit Enrollment Defaults** functionality has been enhanced to provide users the ability to deactivate the HSA Citizenship and the Spousal Coordination of Benefit feature in Step 4 of the Employee Self Service On-Line Enrollment Modules and the Open Enrollment functionality in Manager Services.

ESS Online Enrollment Defaults:

User ID: genweb

Deduction Start Date: Use Enrollment Date Use Eligibility Date Use

Deduction End Date: Full/No Arr-A

Arrears Option: Each Pay Period

Pay Frequency: 2023

Tax Year: 0

Priority:

Display tobacco user status in ESS and allow employees to change for self and dependents:

Display and update Email Address(es) in the Personal Information Page:

Allow change of Dependent Status in the Dependents Page:

Require user to upload Dependent Verification documents:

Include Tobacco Attestation Form:

Enable Spousal Coordination:

Enable HSA Citizenship:

Allow an employee to enroll in non-primary benefit group:

ESS Total Compensation Statement View Date Range:

Short Term Dis. Employee Only 01/01/2023 0.84 coverage

Decline Coverage

Suppl. Life Plan

Suppl. Life

Decline Co

Health Sa

HSA

HSA Fam

HSA Self

HSA Catch-Up 1,000.00 09/11/2023 contribution

Decline Coverage

An employee may have a HSA account if they are not an American Citizen. What is your Citizenship? .

US Citizen

Select the appropriate Spousal Coordination of Benefits option pertaining to your medical enrollment:

- My spouse is not eligible for Medicare and is either not employed or their employer does not offer medical coverage
- My spouse is either eligible for Medicare or their employer offers medical coverage to my spouse only
- My spouse's employer offers medical coverage to both my spouse and dependents

ok

- A new field “Allow an employee to enroll in non-primary benefit group” has been added to the **Benefit Enrollment Defaults** functionality.
 - By default, this checkbox is marked as YES, and the user will still be able to enroll employees in Benefit Plans that are not assigned to the Primary Benefit Group defined in the Work Profile functionality.
 - To enable the feature that will not “Allow an employee to enroll in non-primary benefit group” in Benefit Plans that are not assigned to the

Primary Benefit Group that is defined in the Work Profile functionality, deselect the checkbox.

- An error message will be displayed to the user when submitting the record in the Benefit Enrollment and Benefit Transfer functionality if the Benefit Plans being assigned to the employee are not defined in the employee's Primary Benefit Group that is defined in the Work Profile functionality.

The screenshot shows the 'ESS Online Enrollment Defaults' configuration page. It includes the following settings:

- User ID: genweb
- Deduction Start Date: Use Enrollment Date, Use Eligibility Date, Use
- Deduction End Date:
- Arrears Option: Full/No Arr-A
- Pay Frequency: Each Pay Period
- Tax Year: 2023
- Priority: 0
- Display tobacco user status in ESS and allow employees to change for self and dependents:
- Display and update Email Address(es) in the Personal Information Page:
- Allow change of Dependent Status in the Dependents Page:
- Require user to upload Dependent Verification documents:
- Include Tobacco Attestation Form:
- Enable Spousal Coordination:
- Enable HSA Citizenship:
- Allow an employee to enroll in non-primary benefit group:** (highlighted with a red box)

ESS Total Compensation Statement View Date Range:

Benefit Enrollment – Core Benefits Assignment

In the **Benefit Enrollment** functionality in Manager Services, when a Core Benefit Plan was assigned that had an Employer Deduction, the deduction start date was created based on the Benefit Enrollment Effective Date instead of the Pay Period End Date (if settings were defined in Benefit Enrollment Defaults to start the deduction on the Pay Period End Date). The program has been modified to assign the Employer Deduction based on the Pay Period End Date (if settings are defined in Benefit Enrollment Defaults to start the deduction on the Pay Period End Date).

Deduction Data Import

- The system was not producing an error on the error report if the import contained records for an Employee Number/Legal Entity combination that was invalid because that Employee Number did have a record in Misc. Payroll for that Legal Entity. This has been corrected.
- On the screen to initiate the Import – there has been a new checkbox added. This checkbox is labeled Generate Import Report, and checking this box before submitting the import will produce a PDF report of successfully imported records resulting from the import.

Deduction Data Import

* = Required

***File Name:** No file chosen

The File Name must contain your Customer Number and be in .csv format

Employer Deductions – HSA and FSA Enrollments

Currently in the Employer Deduction functionality for Manager Services, the Benefit / HSA / FSA fields are not populated with data. The functionality has been enhanced to populate the data when the Benefit / HSA or FSA enrollment occurs.

Summary	Address	Education	Employee Positions	Employee Overview	Employment Status	Payched
<p>Beatrice Benefits</p> <p>Human Resources Assistant</p> <p>CONS. Group / Olympics / USA / Alpine Ski / Womens Team / California / Northern</p> <hr/> <p>Employee Details</p> <p>Number: 3242</p> <p>Status: Active</p> <p>Hire Date: 01/15/2023</p> <p>Reports To:</p> <p>Direct Reports: 0</p>	<p style="color: #e67e22;">Update Employer Deduction</p> <p><small>* = Required</small></p>			<p style="color: #e67e22;">Legal Entity: Olympics, Inc.</p>		
	<p>* Payroll Deduction: Medical</p> <p>* Start Date: 01/31/2023</p> <p>* Frequency: Semi Monthly</p> <p>Fixed Amount: <input type="text" value="844.50"/></p> <p>Adjustment Amount: <input type="text" value="0.00"/></p> <p>Recurring Adjustment? <input type="checkbox"/></p> <p>Percent of Regular Wages: <input type="text" value="0.0000"/></p> <p>Percent of Employee Contribution: <input type="text" value="0.0000"/></p> <p>Minimum Per Pay Period: <input type="text" value="0.00"/></p> <p>Maximum Per Month: <input type="text" value="999,999,999.99"/></p> <p>Maximum Per Year: <input type="text" value="20,268.00"/></p> <p>Maximum Total: <input type="text" value="999,999,999.99"/></p> <p>Benefit Group: SGM Benefits</p> <p>Benefit Option: Employee Only</p> <p>FSA Group: *No Value</p> <p>FSA Year: 0000</p> <p>HSA Group: *no value</p>	<p>Active: <input checked="" type="radio"/> Yes <input type="radio"/> No</p> <p>End Date: <input type="text" value="12/31/9999"/></p> <p>Fixed Amount - Supplemental: <input type="text" value="0.00"/></p> <p>Adjustment Effective Date: <input type="text"/></p> <p>Percent of Supplemental Wages: <input type="text" value="0.0000"/></p> <p>Up To Percent of Employee Wages: <input type="text" value="0.0000"/></p> <p>Maximum Per Pay Period: <input type="text" value="999,999,999.99"/></p> <p>Maximum Per Quarter: <input type="text" value="999,999,999.99"/></p> <p>Maximum Per Fiscal Year: <input type="text" value="999,999,999.99"/></p> <p>Use Tier Formula: No</p> <p>Benefit Plan: Medical</p> <p>Benefit Enrollment Date: 01/15/2023</p> <p>Flex. Spending Account: *No Value</p> <p>HSA Year: 0000</p> <p>Health Savings Account: *no value</p>				
<p><input type="button" value="submit"/> <input type="button" value="cancel"/></p>						

Health Savings Accounts Plans

In the **Health Savings Account Plans** functionality in Manager Services for the Employer and Employee Maximum Contribution, if different values existed in Deduction Definition (Maximum EE/ER Combined) and Employer Deduction Contribution (Fixed Deduction Amount / Maximum Per Year), the Employer and Employee Maximum Contribution Amounts from the Health Savings Account Plans were not being taken. The program has been modified to use the values stored in the Health Savings Account Plans Employer and Employee Maximum Contribution fields.

Paid Time Off Liability Report

This report has been updated to use new report programming and now uses the latest multi-format engine.

In Manager Services – the Report Formats field now allows for users to select from these formats:

- PDF
- XLS
- XLSX
- XML
- CSV
- TXT

If the user selects **Criteria File** in the Report Format field, the system will create a text file named <report name>-<job number>-criteria.txt that displays the options the user selected when running the report, and that may have been in the header on a PDF report. This allows the row and column aspects of CSV, XLS, XLSX, TXT reports to maintain their row and column characteristics and show one record per row.

The screenshot shows the 'Paid Time Off Liability Report' configuration interface. At the top, it says '* = Required'. Below this, there are two main sections: 'Selection By Legal Entity:' and 'Select Report Parameters:'. Under 'Selection By Legal Entity:', the 'Legal Entity:' field is set to 'Olympics, Inc.'. Under 'Select Report Parameters:', there are several fields: 'Paid Time Off Group:' is a dropdown menu currently showing '*no value' with a list of options including 'San Diego Sick', 'Sick Beg Yr', 'Sick Every Hour', 'Sick Every Pay', 'Sick Time', and 'Vacation'. '*Paid Time Off:' is a red label. '*Report ID:' is a text input field containing 'PaidTimeOffLiabilityRep'. 'Report Break at Level:' is a dropdown menu set to '2'. 'Include Negative Balances:' has a checked checkbox. 'Display Paid Time Off with Zero Amounts:' has an unchecked checkbox. 'Sort By:' has two radio buttons, 'Employee Number' (selected) and 'Employee Name'. '*Report Formats:' has several checkboxes: PDF, XLS, XLSX, XML, CSV, TXT, and Criteria File. At the bottom, there are two buttons: a green 'submit' button and a red 'cancel' button.

Pay Code Definition / Pay Process Control

Due to the new regulations for Alabama State Income Tax that will take effect in 2024, where Overtime Pay will be exempt from Alabama State Income Tax, a new checkbox has been added to the Pay Process Control screens within the Pay Code Definition function to identify such pay types. This checkbox is labeled “Overtime Pay Type.”

Update Pay Process Control

Legal Entity:	Olympics, Inc.	Type Of Pay:	Overtime
Hourly Rate Override:	0.000	Algorithm Method 1:	Special Rates ▼
Use Hourly Rate:	0	Algorithm Method 2:	Pay Type Diff. ▼
Accrue Paid Time Off Hours:	<input checked="" type="checkbox"/>	Algorithm Method 3:	Shift Diff. ▼
SUI Labor Hours:	<input checked="" type="checkbox"/>	No Pay Pay Type:	<input type="checkbox"/>
Include in Base Wage:	<input checked="" type="checkbox"/>	Average Rate Overtime:	<input checked="" type="checkbox"/>
Taxable Life:	<input type="checkbox"/>	Include in Average Rate Hours:	<input type="checkbox"/>
Include in SUI Weeks Worked:	<input checked="" type="checkbox"/>	Include Pay in Average Rate:	<input type="checkbox"/>
Eligible for Retro Pay:	<input checked="" type="checkbox"/>	Use Shift to Calculate Pay:	<input checked="" type="checkbox"/>
Include In Lifetime Hours Worked:	<input checked="" type="checkbox"/>	Third Party Sick Pay:	<input type="checkbox"/>
New York Other Wages:	<input type="checkbox"/>	Include in Workers Comp. Hours:	<input checked="" type="checkbox"/>
Include in EEO-1 Hours:	<input type="checkbox"/>	Include in Total Hours Worked:	<input checked="" type="checkbox"/>
Declared Tip:	<input type="checkbox"/>	Tip Credit:	<input type="checkbox"/>
COVID-19 Leave Type:	*no value ▼	Overtime Pay Type:	<input type="checkbox"/>

→ submit
← cancel

If you are a Hosted customer and your organization collects Alabama State Income Tax from employees, check this box for all Pay Types in each Legal Entity that represent Overtime Pay that will be exempt from Alabama State Income Tax.

The State is requiring employers to report overtime wages starting for tax year 2023 by Jan. 31, 2024 - so this identification of Overtime Pay Types must be completed before your last payroll of 2023.

If your Organization Outsources its payroll with Unicorn HRO and you have employees in Alabama, please contact your Pay Support representative with the information needed to identify these Pay Types for your Legal Entities.

Quarterly FLI MLI Wages and Hours Export

The file that is created from this function for the state of Washington has been updated per the specifications from the state to include the employee’s date of birth as the last field in each record.

Terminate Employee-Terminate Benefit Tab and Terminate Benefit Enrollment

In the Terminate Employee functionality in Manager Services, on the Terminate Benefit Tab, if the Coverage End Date was less than the Enrollment Date of the future Benefit Enrollment, the future Benefit Enrollment would not be displayed. The program has been modified to display the future Benefit Enrollment record. The program also has been modified to generate a warning message if the Coverage End

Date entered is less than the Enrollment Date of the future Benefit Enrollment record being terminated. The warning will allow the user to either complete the Terminate Benefits process with the existing Enrollment End Date by clicking OK – or will allow the user to click Cancel to change the Enrollment End Date to any date they choose.

In the example below – the employee enrolled in a Medical Plan – and the Enrollment Date was in the future because the Enrollment Date was set to be the Eligibility Date, and the Eligibility Date for that plan option was set to 30 days/Next First of Month. The employee was hired with an 8/1/2023 Hire Date, and the Enrollment Date/Eligibility Date on his enrollment for Medical was set to 9/1/2023. However, the employee was terminated on 8/16/2023 - before that Enrollment Date/Eligibility Date of 9/1/2023.

Terminate Benefits Deductions Employer Deductions

Ollie Georgia
 Assistant Coach and Trainer
 Cons. Group / Olympics / US Corporate / Alpine Ski / Mens Team I / California / Northern Grp

*Coverage End Date: 08/16/2023

Click checkboxes to select the benefits to be terminated. Click Submit to terminate benefits. [Select All](#) [Unselect All](#)

Select	Benefit Group	Benefit Plan	Benefit Option	Enrollment Date
<input checked="" type="checkbox"/>	SLF Benefits	MED POS	Employee Only	09/01/2023

submit cancel

Message from webpage

?

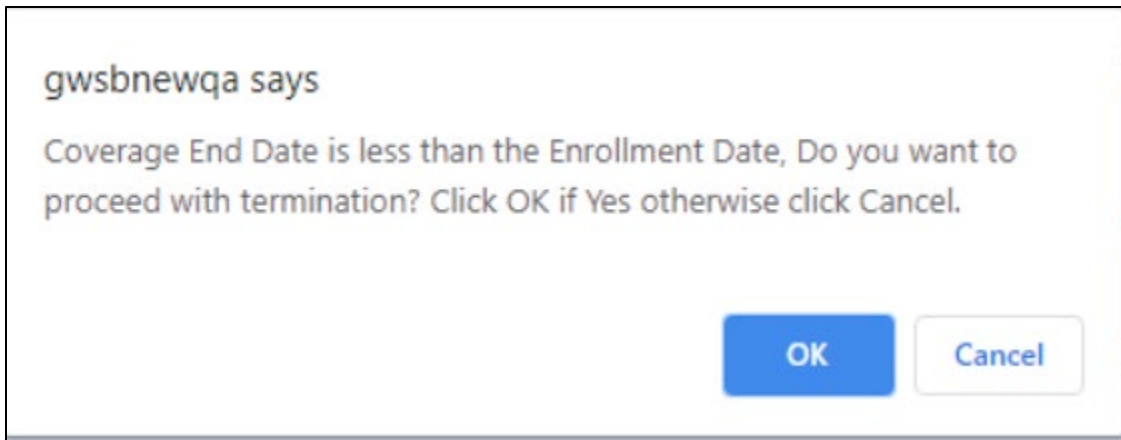
Coverage End Date is less than the Enrollment Date, Do you want to proceed with termination? Click OK if Yes otherwise click Cancel.

OK Cancel

Similarly – in the Terminate Benefit Enrollment function – if the Coverage End Date entered is less than the Enrollment Date of the future Benefit Enrollment - a warning message will appear that allows the user to either complete the Terminate Benefit Enrollment process with the existing entered Coverage End Date by clicking OK – or

will allow the user to click Cancel stop the Terminate Benefit Enrollment process and possibly re-start it with a new Coverage End Date.

Benefit Category	Benefit Plan	Benefit Option	Enrollment Date	Select
Medical	MED POS	Employee Only	09/01/2023	<input checked="" type="checkbox"/>



Total Compensation Statement

Currently the Total Compensation Statement will display active and inactive dependents for an employee at the time the statement is generated in the Total Compensation Report function. The functionality has been enhanced to only display active dependents.

State Income Tax Withholding

- Illinois**

The state has changed the primary withholding allowance amount from \$2,625.00 to \$2,425.00 for 2023. The state has required that for “employees on your payroll in the first part of 2023,” to adjust withholding the rest of 2023 to make up for the under withholding at the beginning of the year – to use the amount of \$2,225.00 in the formula as the Primary Withholding Allowance Amount. A programming change has been made so that for the formula for calculating Illinois SIT- for employees who have an Adjusted Hire Date before June 7, 2023 - the amount of \$2,225.00 will be used as the Primary Withholding Allowance Amount. For all other employees - with

Adjusted Hire Date of June 7, 2023 and later - the formula will use the amount of the Primary Withholding Allowance Amount for Illinois that will be in the iCON tax tables effective June 7, 2023 - which will be \$2,425.00.

- ***North Dakota***

The state published new Tax Tables for tax year 2023 in May 2023. The Tax Tables to be used for employees who last provided a North Dakota W-4 before January 1, 2020 are now different for Married and Single, as compared to the Tax Tables for employees who last provided a North Dakota W-4 January 1, 2020 and later. Special programming was needed to accomplish the correct calculations for North Dakota SIT withholding. The Tax Tables that appear in Tax Manager are the Tax Tables for Married, Single, and Head of Household for employees who last provided a North Dakota W-4 January 1, 2020 and later.

Updated Employee Self Service Functions (Classic ESS)

This section describes updated functions in Classic Employee Self Service.

First Time Enrollment - Rehires

In the Employee Self Service On-Line Enrollment Module-First Time Enrollment-functionality, if an employee was rehired that previously had coverage end dates on previously elected benefit enrollments, the program would update the coverage end date for the previously ended enrollments and the new coverage end date was written the day before the new benefit enrollment date. The program has been modified to update the coverage end date only if the coverage end date is blank or greater than calculated coverage end date.

Updated iCON Tools Functions

This section describes updated functions in iCON Tools.

Paid Time Off Liability Report

This report in iCON Tools has also been updated – similar to the change in the Manager Services version of the function as mentioned above - to use new report programming and now uses the latest multi-format engine.

In iCON Tools– the Report Formats field now allows for users to select from these formats:

- PDF
- XLSX
- XML
- CSV
- TXT

If the user selects **Criteria File** in the Report Format field, the system will create a text file named <report name>-<job number>-criteria.txt that displays the options the user selected when running the report, and that may have been in the header on a PDF report. This allows the row and column aspects of CSV, XLSX, TXT reports to maintain their row and column characteristics and show one record per row.

Pay Code Definition / Pay Process Control

Similar to the change mentioned above in the Manager Services version of this function, due to the new regulations for Alabama State Income Tax that will take effect in 2024, where Overtime Pay will be exempt from Alabama State Income Tax, a new checkbox has been added to the Pay Process Control screens within the Pay Code Definition function to identify such pay types. This checkbox is labeled “Overtime Pay Type.”

If you are a Hosted customer and your organization collects Alabama State Income Tax from employees, check this box for all Pay Types in each Legal Entity that represent Overtime Pay that will be exempt from Alabama State Income Tax.

The State is requiring employers to report overtime wages starting for tax year 2023 by Jan. 31, 2024 - so this identification of Overtime Pay Types must be completed before your last payroll of 2023.

If your Organization Outsources its payroll with Unicorn HRO and you have employees in Alabama, please contact your Pay Support representative with the information needed to identify these Pay Types for your Legal Entities.